

University of Houston Concur Instructions

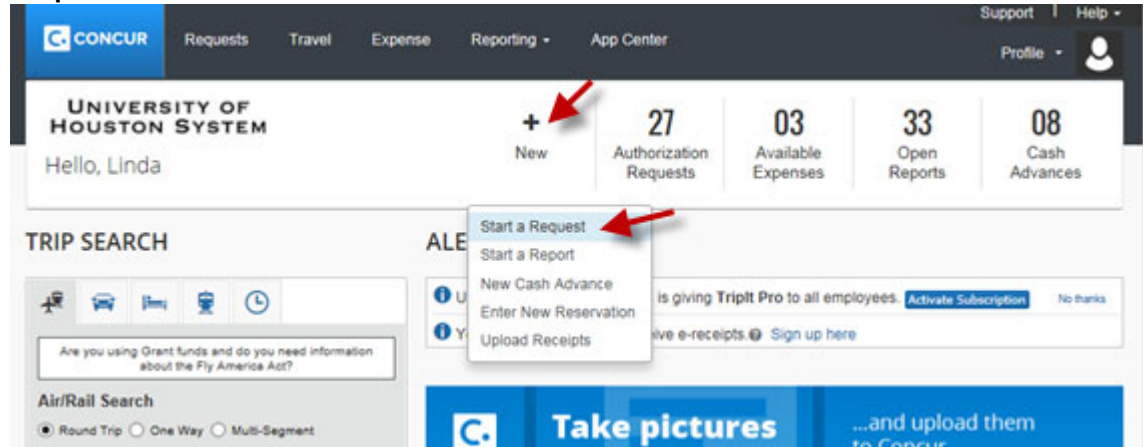
Creating a Travel Request

Step 1: Go to the Request page and select “New Request”.

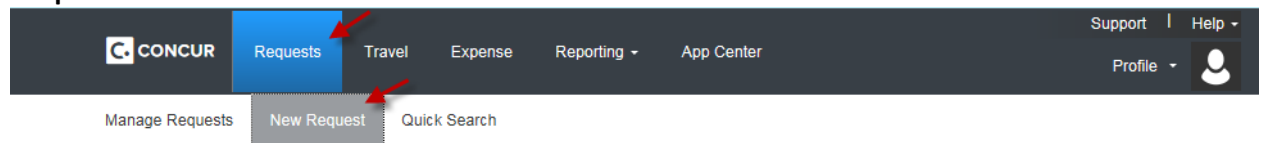
To go to the Request page, you can:

- (1) Click on + New, then select “Start a Request” (See Snapshot #1); or
- (2) Click on “Requests”, then click on “New Request” (See Snapshot #2)

Snapshot #1



Snapshot #2



Step 2: Complete the information in the Request Header.

This screenshot shows the 'Request' form in the Concur system. The form is titled 'Request' and has a status of 'Not Submitted'. It includes several tabs: 'Request Header', 'Segments', 'Expenses', 'Approval Flow', and 'Audit Trail'. The 'Request Header' tab is active, showing various fields for entering request information. The fields are organized into three columns:

- Left Column:** Document ID (Traveller, L Paris 040115), Travel Type (Travel Outside US, Canada, and Mexico), Travel End Date (04/08/2015), Number of Personal Days (0), and Destination City 1 (Paris, FRANCE).
- Middle Column:** Primary Purpose of Travel (Conference, workshop, training), Request Policy (UH Request Policy), Purpose/Benefit (Attending the International technology conference for obtaining information and networking), Foreign Travel for Employee/Prospective Employee (Yes), and Additional Destination Cities.
- Right Column:** Traveler Type (Employee), Travel Start Date (04/01/2015), Duration (Days) (0), Is a state fund cost center used on this trip? (No), and Business Unit ((00730) University of Houston).

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Department (H0156) H0156 FINANCE	Fund Type LOCAL	Fund Code (2064) DESIG-TUITION
Program) ASSOC. VC/VP FINANCIAL OPERATI	Project NA	Grant Type NON-GRANT
Chartfield1 DO NOT USE		
Will any travel cost be paid by a non-UH third party? No	Name of non-UH third party	100% of travel cost paid by non-UH third party?
Public Health Service (PHS) Grant?		

Document ID

Enter the travel information in the following format:

Traveler Last Name, Traveler First Name initial Destination City Departure Date (MMDDYY)

You can enter up to 30 characters in this field.

Primary Purpose of Travel

Select the primary purpose of the travel from the dropdown box. The dropdown box lists the following purposes:

- Conference, workshop, training
- Contracted services to UHS (paid a fee)
- Federal government meeting
- Househunting expenses
- Moving expenses (not househunting)
- Recruit employees
- Recruit students
- Research
- State government meeting
- Student field trip
- Study abroad trip
- Team competition
- Whatever is not listed above (describe in Comments)

Traveler Type

This field is grayed out. Concur will automatically pull this information from the user profile.

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Travel Type

Select the travel type from the dropdown

Employee Travel in Texas (Not Student Recruiting)

Employee Travel Outside TX, but Inside US, Canada, or Mexico

Employee Travel Outside US, Canada, and Mexico

Employee Travel to Recruit Students (All Destinations)

New Employee Moving Expenses

Participant Cost Travel

Prospective Employee Travel

Prospective Student Travel

Regent Travel in Texas

Regent Travel Outside Texas

Student Field Trip in the US

Student Study Abroad Travel

Student Team Competition

Student Travel (Not Field Trip, Study Abroad, Competition)

box:

Travel for a Consultant (Paid a Fee)

Travel for a Lecturer/Artist (Paid a Fee)

Travel for Other Contractor (Paid a Fee)

University Guest Travel (Not Paid a Fee)

Request Policy

This field is grayed out. It indicates that Travel Request is processed in compliance with the UH Request Policy.

Travel State Date and **Travel End Date**

Enter the departure date and return dates.

Purpose/Benefit

Enter the purpose/benefit of the trip.

Duration (Days)

You do not need to enter any value in this field. Once the request is saved, Concur computes the travel days and indicate it in this field.

Number of Personal Days

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Enter the number of personal days planned for the trip. Personal days are days that you are NOT WORKING FOR UH. I suggest you keep it to 0 because the University will want justification for every day you are on the trip and can possibly withhold reimbursement. If none, enter "0" (zero).

Foreign Travel for Employee/Prospective Employee

Indicate whether the travel is to or from countries outside Canada, Mexico, the United States, and the U.S. territories and possessions for an employee or prospective employee.

Is a state fund cost center used on this trip?

Indicate whether state funds will be used for the trip. (Most likely "no")

Destination City 1 and Additional Destination Cities

Enter the destination city or cities. Multiple destinations can be indicated in the "Additional Destination Cities" using semi-colons (e.g., Paris; London, etc.)

Business Unit, Department, Fund Type, Fund Code, Program, Project, Grant Type, Chartfield1

Concur automatically fills in a default cost center from the department's main account. To change the cost center to your faculty's account, select each field in the order presented

Business Unit: 00730

Department: H0067

Fund Type: Local

Fund Code: use your professor's acct

Program: use your professor's acct

Project: use your professor's grant or put NA if non-grant

Grant Type: choose "Grant" or "non-grant"

Chartfield: choose "Do Not Use"

Will any travel cost be paid by a non-UH third party?

Enter "Yes" or "No".

Name of non-UH third party

If "Yes" is selected for a non-UH third party payment, enter the name of the third party.

100% of travel cost paid by non-UH third party?

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If "Yes" is selected for a non-UH third party payment, indicate whether 100% is paid by the third party. If 100% is paid by the third party, you do not need to provide additional information. If less than 100% is paid by the third party, you must attach a letter from the third party indicating the information about their payment.

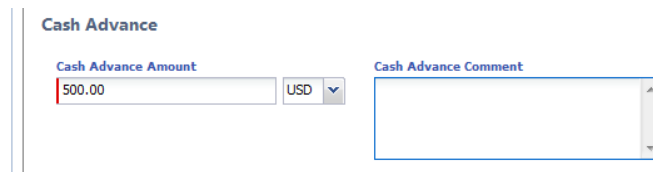
Public Health Service (PHS) Grant

If "Yes" is selected for a non-UH third party payment, indicate the traveler's association with a PHS grant. If the traveler's salary was paid from a PHS grant and/or he/she is an investigator on the grant, Concur sends an e-mail notification to the Office of Research Policies, Compliance, and Committees, so ORPCC can follow up with the department later. ORPCC does not approve the Travel Request or delay the approval process.

Step 3: If you are requesting a Travel Advance, complete the Cash Advance section.

Note: Travel Advances are available for employee foreign travel and group travel only. Only employees who are eligible for Travel Advances may receive Travel Advances.

The Cash Advance section is on the bottom of the Request Header page. Enter the amount.



Cash Advance

Cash Advance Amount: 500.00 USD

Cash Advance Comment:

Step 4: Save the header information by clicking on "Save".



Cancel Save Print / Email Delete Request Submit Request

Status: Not Submitted

Step 5: Complete the information in the Segments page.

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Request 34LR

Document ID: Traveler,L Paris 040115
Purpose/Benefit: Attending the International technology conference for obtaining information and networking.

Request Header Segments Expenses Approval Flow Audit Trail

Add Segment
CLICK ICON TO CREATE SEGMENT

Icons: Airplane, Car, Bed, Fork and Knife, Car with Driver, Magnifying Glass

Attachments Print / Email Delete Request Submit Request

Status: Not Submitted

Click on an appropriate icon to complete the segment information.

Airfare

Enter the request amount, departure/arrival cities, and dates. Other fields are optional.
Click on "Save".

Air Ticket

Round Trip One Way Amount: USD

Outbound

From: George Bush Intercontinental (IAH), Houston, TX, United S

To: Paris Area Airports (PAR), Paris, France

Date: 04/01/2015 Depart at

Comment:

Return

Date: 04/08/2015 Depart at

Car Rental

Enter the request amount, pick-up/drop-off cities. Other fields are optional. Click on "Save".

Car Rental

Amount: 200.00 USD

Pick-up

City: Paris, FRANCE

Date: At

Detail:

Drop-off

City: Paris, FRANCE

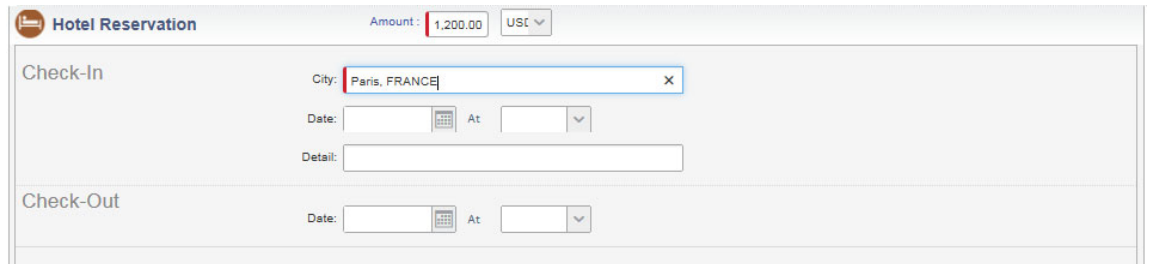
Date: At

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Hotel Reservation

Enter the request amount and city. Other fields are optional. Click on “Save”.

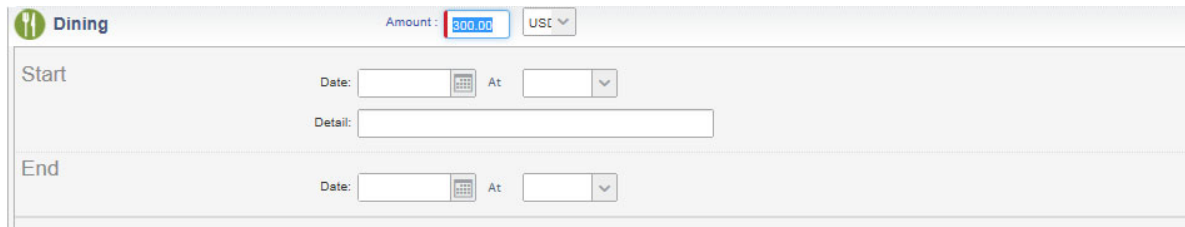


The screenshot shows the 'Hotel Reservation' form. At the top, there is a header bar with a hotel icon, the title 'Hotel Reservation', and an 'Amount' field set to '1,200.00' with a currency dropdown set to 'USD'. Below this, the form is divided into two main sections: 'Check-In' and 'Check-Out'. The 'Check-In' section includes a 'City' dropdown menu currently showing 'Paris, FRANCE', a 'Date' field with a calendar icon, an 'At' dropdown, and a 'Detail' text field. The 'Check-Out' section includes a 'Date' field with a calendar icon and an 'At' dropdown.

Dining (Travel Meals)

Enter the request amount. Other fields are optional. Click on “Save”.

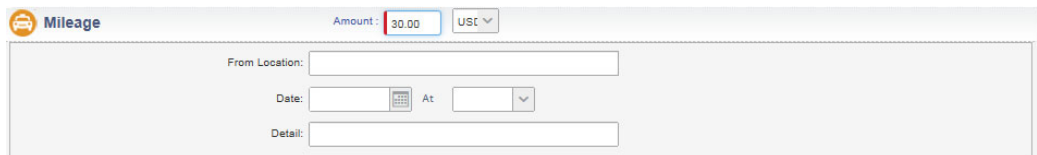
You may create separate segments for travel meals and business meals.



The screenshot shows the 'Dining' form. At the top, there is a header bar with a dining icon, the title 'Dining', and an 'Amount' field set to '300.00' with a currency dropdown set to 'USD'. Below this, the form is divided into two main sections: 'Start' and 'End'. The 'Start' section includes a 'Date' field with a calendar icon, an 'At' dropdown, and a 'Detail' text field. The 'End' section includes a 'Date' field with a calendar icon and an 'At' dropdown.

Mileage

This category is for driving your personal vehicle. Enter the amount and “Save”.



The screenshot shows the 'Mileage' form. At the top, there is a header bar with a car icon, the title 'Mileage', and an 'Amount' field set to '30.00' with a currency dropdown set to 'USD'. Below this, the form includes a 'From Location' text field, a 'Date' field with a calendar icon, an 'At' dropdown, and a 'Detail' text field.

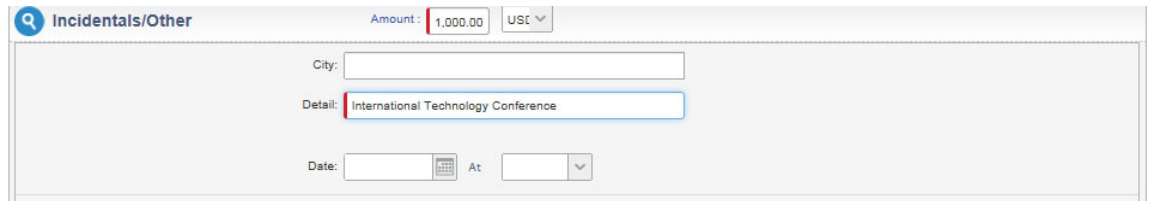
Incidentals/Other

Enter the request amount and expense detail. Other fields are optional. Click on “Save”.

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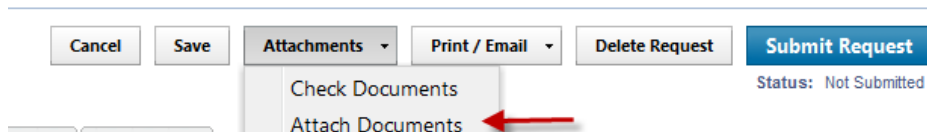
Creating a Travel Request

You should use this segment for registration, parking, rental car gasoline, and other incidental expenses. For registration, the conference name should be entered in the Details field.



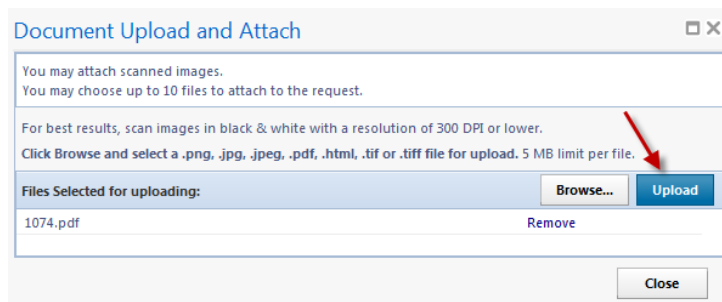
Step 6: Attach required documents if necessary.

Click on “Attachments” and select “Upload and Attach”.



Click on “Browse” and select any documents from your file to attach.

Upload the document by clicking on “Upload”.



Examples of documents to attach to the Travel Request:

- Conference agenda, trip itinerary day-by-day
- Export Controls form for foreign travel

Step 7: Approval Flow tab

After you complete the “Segments” tab, open the “Approval Flow” tab. Make sure your supervisor is correct, that is where the request will route to. In the box “Certifying Signatory Level 2,” make sure it has our dept business administrator’s name.

Step 8: Submit the request in workflow.

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Click on “Submit Request”.

Request 34LR

[Cancel](#) [Save](#) [Attachments ▾](#) [Print / Email ▾](#) [Delete Request](#) [Submit Request](#)

Document ID: Traveler, L Paris 040115

Purpose/Benefit: Attending the International technology conference for obtaining information and networking.

Status: Not Submitted

Amount: \$4,200.00

The system asks for your confirmation. Click on “Accept & Submit”

Final Review

Request Submit Confirmation

Are you sure you want to submit this request?

Accept & Submit

Cancel